



Introducing Oracle BI / XML Publisher

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- Learn how to use XML Publisher to create reports
- Understand how templates are used to declaratively build reports
- Generate multiple output formats including: HTTP (XML), RTF, and PDF



- I. Introduction to XML Publisher
 1. Standards Underneath XML Publisher
 2. XML Publisher Process Flow
 3. Report Templates & Data Sources
 4. Installation and Configuration
- II. Report Editor
 1. Report Templates
 2. Query Builder
 3. Creating Reports
 4. Dataset types
- III. Report Forms
 1. RTF Templates
 2. Report Components
 3. Formatting Options
 4. Number and Date formatting
 5. Using XSL and XSL:FO for PDF



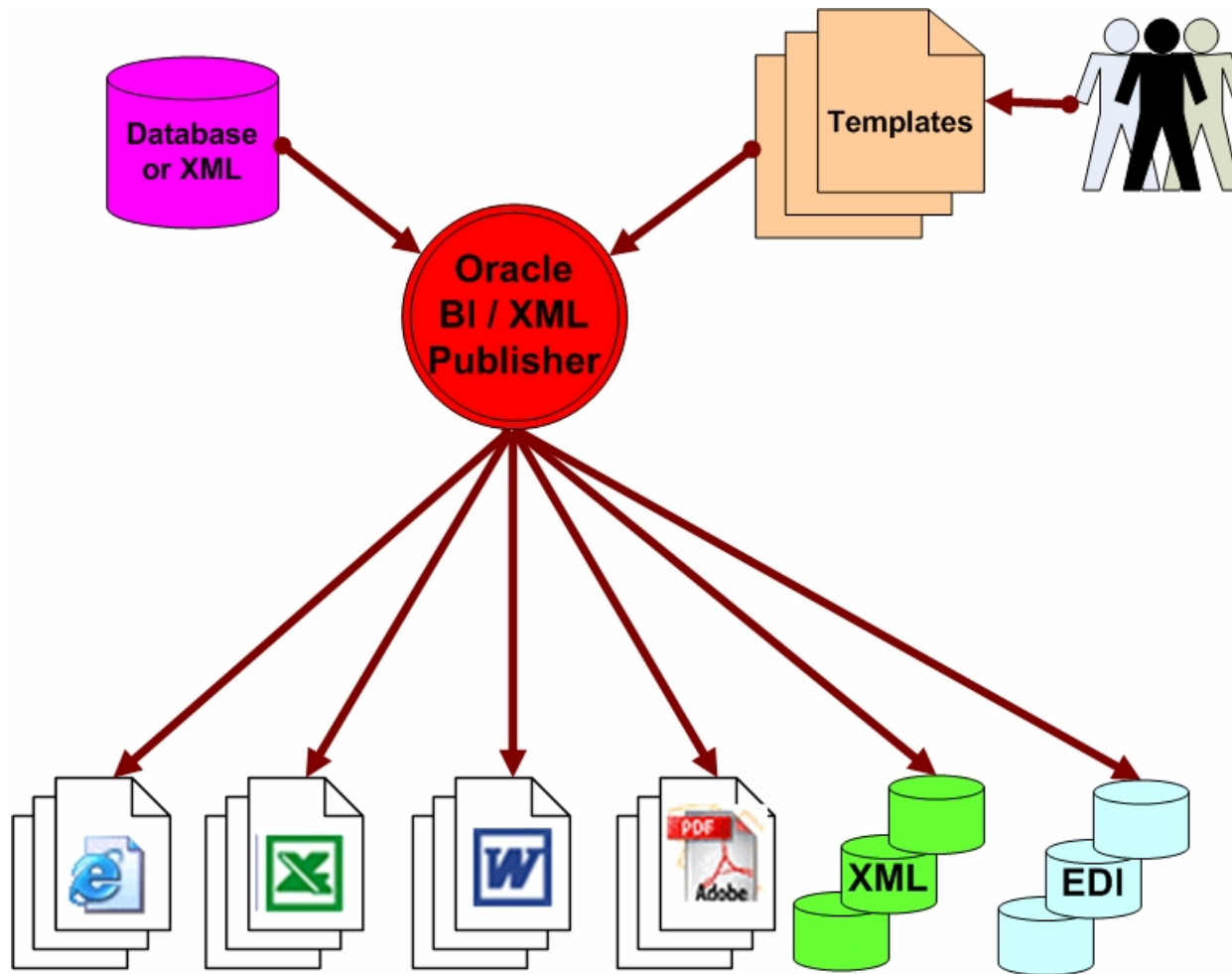
- Oracle BI / XML Publisher:
 - Powerful report generation tool
 - Creates standardized reports containing Oracle (and other) data quickly and easily
 - Originally intended to support Oracle' various ERP tools (Oracle E-Business Suite, JD Edwards, PeopleSoft, Siebel, etc...)
 - BI / XML Publisher is now available as a separate product or as part of Oracle BI Suite Enterprise Edition R3 10g (based upon Siebel Analytics 7.8)



- Standards Underneath XML Publisher include:
 - XML
 - SQL
 - Java EE
 - RTF
 - PDF
 - WebDav
 - Microsoft Word & Microsoft Excel



- XML Publisher Process Flow
 1. Create / identify data source(s)
 2. Create / identify template(s)
 3. Create and distribute reports and/or report data using BI / XML Publisher (HTML, Microsoft Excel, Microsoft Word, PDF, XML/XSL, EDI, others...)





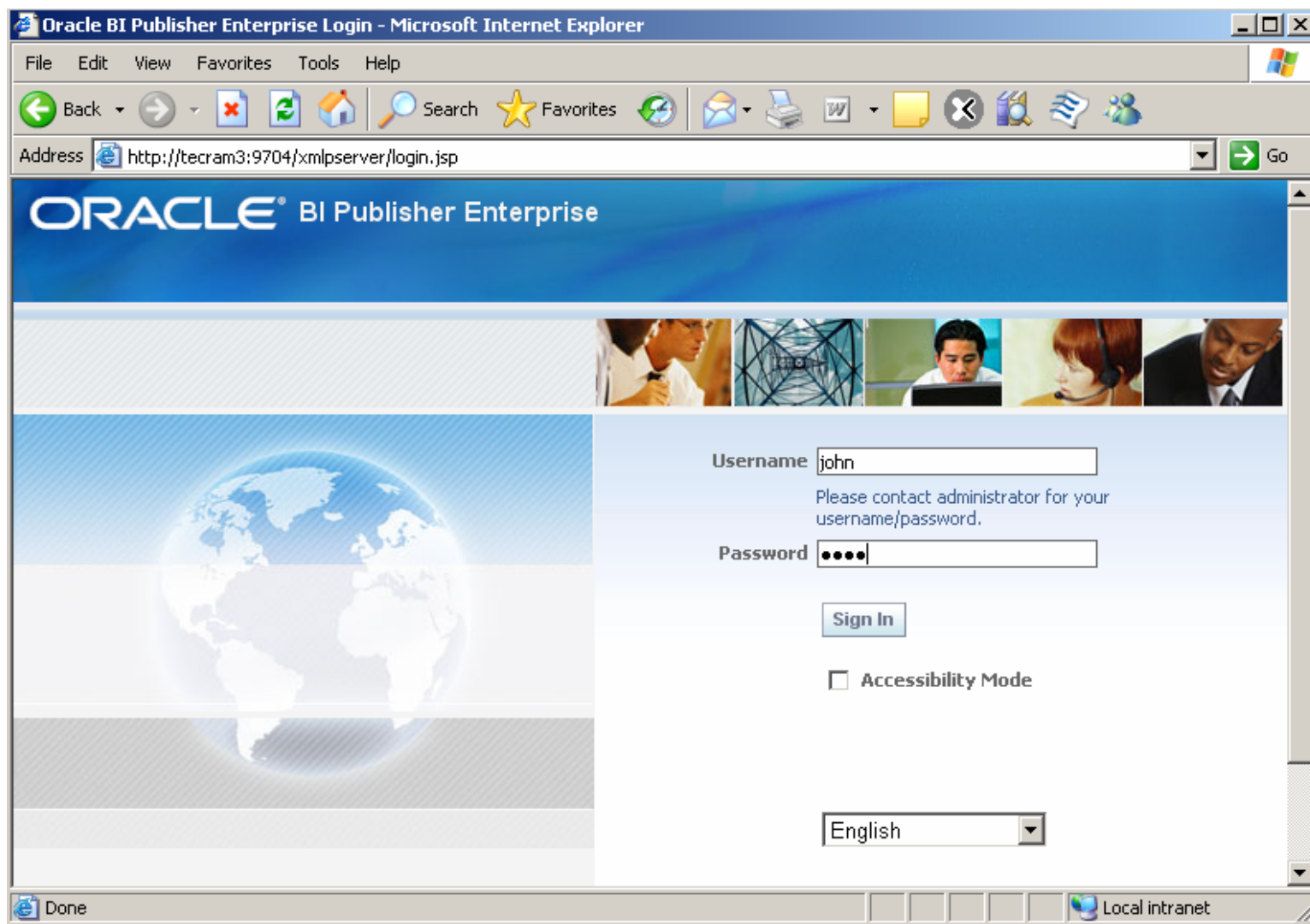
- Report Templates are based upon W3C standard XSL-FO
- Many XSL editors currently exist that can generate report formats for XSL-FO
- The BI/XML Publisher Client provides template creation using Microsoft Word, Microsoft Excel, and Adobe Acrobat (tools probably familiar to report users)



- BI / XML Publisher can work with:
 - SQL Data
 - Oracle, Microsoft SQL Server & IBM DB2 today
 - More tomorrow
 - XML Data



- XML Publisher Installation and Configuration
 - XML Server is installed using the Oracle installer
 - XML Client is windows-based and is installed using a windows setup program





- Each user has access to folders containing reports

Oracle BI Publisher - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Recycle Bin Mail Print Word Pad New Folder Close All Help

Address <http://tecrum3:9704/xmlpserver/servlet/report> Go

ORACLE BI Publisher Enterprise

Welcome, john Preferences Sign Out Help

Reports Schedules Admin

Welcome to Oracle BI Publisher

Search

Search

Shared Folders

- [Business Intelligence](#)
- [Executive](#)
- [Financials](#)
- [more ...](#)

My Folders

- [Users](#)



Oracle BI Publisher - Microsoft Internet Explorer

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Address <http://tecam3:9704/xmlpserver/servlet/report?f=%2FFinancials> Go

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Reports Schedules Admin

Home > Shared Folders > Financials

Search

Search

Folder and Report Tasks

- Create a new folder
- Create a new report
- Upload a report
- Template Builder

Order Entry

- Customer Orders

Balance Letter

This is a Balance Letter for the E-Business Suite ARXCBLX report data source is an XML files in the "demo files" file data source. Mal the data source is setup and porir the right directory. Translations f German (Germany), Japanese (J and Arabic (Egypt) are provided. change the "Report Locale" in the preferences to test the translatio

Date

Modified 10/18/06 6:54 PM Pacific

[View](#) [Schedule](#) [History](#) [Edit](#) [Configure](#)

Local intranet



- The BI / XML Publisher Report Editor allows manipulation of report data and specification of new and/or different templates
 - View
 - Schedule
 - History
 - Edit
 - Configure





Oracle BI Publisher - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address <http://tecram3:9704/xmlpserver/Financials/Balance+Letter/Balance+Letter.xdo> Go

Page 1 of 1

ORACLE
An Image

Vision Operations
5645 Main Street
Jacksonville, FL 32209-1234
US

Dear Sirs/Madam,

According to our records as of Thursday, January 1, 2004, we show the following open balances.

Your CAD balance is 31,500.00 made up as follows:

Invoice Number	Date	Amount	Amount Remaining
502444	Dec 6, 2003	19,125.00	19,125.00

Local intranet





Reports | Schedules | Admin

Home > Shared Folders > Financials > Balance Letter [View](#) [Schedule](#) [History](#) [Edit](#) [Configure](#)

Save Generate XLIFF

Report

- New Delete
- Report
 - Data Model
 - New DataSet 1
 - List of Values
 - Parameters
 - Layouts
 - Customer Letter
 - Bursting

Report Properties

General Settings

Report Name: Balance Letter

Description: This is a Balance Letter for the E-Business Suite ARXCOBLX report. The data source is an XML files in the "demo"

Default Data Source: demo [Refresh Data Source List](#)

Parameters per line: 3

Properties

- Run report online
- Show Controls
- Open Links in New Window
- Auto Run



- Data Models for BI/XML Publisher may be created using:
 - SQL queries
 - HTTP (XML)
 - Web services
 - Data Templates
 - Oracle BI Answers requests
 - Files



- Data sources supported:
 - Oracle
 - Non-Oracle



- Within BI/XML Publisher's Report Editor queries may be
 - Manually Coded
 - Created using Query Builder



Home > Shared Folders > Financials > Balance Letter

[View](#) [Schedule](#) [History](#) [Edit](#) [Conf](#)

Save Generate XLIFF

Report

New Delete

Report

Data Model

New DataSet 1

New DataSet 2

List of Values

Parameters

Layouts

Customer Letter

Bursting

Details

Data Source Default Data Source

[Refresh Data Source List](#)

Cache Result

SQL Query

[Query Builder](#)

```
select  COUNTRIES.COUNTRY_NAME as COUNTRY_NAME,
        CUSTOMERS.COUNTRY_ID as COUNTRY_ID,
        CUSTOMERS.CUST_FIRST_NAME as CUST_FIRST_NAME,
        CUSTOMERS.CUST_LAST_NAME as CUST_LAST_NAME,
        CUSTOMERS.CUST_CITY as CUST_CITY,
        CUSTOMERS.CUST_STATE_PROVINCE as
CUST_STATE_PROVINCE
from    SH.CUSTOMERS CUSTOMERS,
        SH.COUNTRIES COUNTRIES
where   CUSTOMERS.COUNTRY_ID=COUNTRIES.COUNTRY_ID
```



- The Query Builder helps build SQL easily

Query Builder - Microsoft Internet Explorer

Schema: SH

Search:

Model Conditions SQL Results 10

Cancel Save

Table	Field	Filter	Order
COUNTRIES	<input type="checkbox"/> COUNTRY_ID	?89	
	<input type="checkbox"/> COUNTRY_ISO_CODE	A	
	<input checked="" type="checkbox"/> COUNTRY_NAME	A	
	<input type="checkbox"/> COUNTRY_SUBREGION	A	
	<input type="checkbox"/> COUNTRY_SUBREGION_ID	?89	
	<input type="checkbox"/> COUNTRY_REGION	A	
	<input type="checkbox"/> COUNTRY_REGION_ID	?89	
CUSTOMERS	<input type="checkbox"/> CUST_STATE_CODE		
	<input checked="" type="checkbox"/> CUST_CITY	A	
	<input type="checkbox"/> CUST_CITY_ID	?89	
	<input checked="" type="checkbox"/> CUST_STATE_PROVINCE	A	
	<input type="checkbox"/> CUST_STATE_PROVINCE_ID	?89	
	<input checked="" type="checkbox"/> COUNTRY_ID	?89	
	<input type="checkbox"/> CUST_MAIN_PHONE_NUMBER	A	
<input type="checkbox"/> CUST_INCOME_LEVEL	A		



- BI/XML Publisher allows report layouts to be specified using Report Templates of various forms:
 - Rich Text Format (RTF)
 - Portable Document Format (PDF)
 - Microsoft Excel (XLS)
 - XSL Stylesheet
 - eText



- Oracle provides BI/XML Publisher Client software that runs within Microsoft Word



- Part of BI Enterprise installation set
- May be downloaded separately as a patch from Oracle MetaLink



- Use Microsoft Word and/or the Oracle BI/XML Publisher client software within Microsoft Word to build .rtf templates
- Templates might also be created using other tools like:
 - Adobe Acrobat
 - Microsoft Excel
 - Altova XML Spy
 - Oracle JDeveloper
 - More...



- Report Components:
 - Groups
 - Fields
 - Headers
 - Footers



- BI/XML Publisher output may take many forms including:
 - PDF
 - RTF
 - EDI
 - EFT
 - XML
 - HTML
 - More...



- BI Publisher has its own extended set of SQL and XSL functions used in RTF templates
- Extended functions are coded using syntax resembling XML Processing Instructions
- for use in RTF templates. The syntax for these extended functions is
 - `<?xdofx:expression?>`
 - Extended SQL functions
 - `<?xdoxslt:expression?>`
 - Extended XSL functions
- Extended SQL and XSL may not be mixed
- Example:
 - `<?xdofx:rpad(FIRST_NAME||LAST_NAME),30,'x')?>`



- BIXML Publisher supports three types of date formatting:
 - Explicit date mask using Microsoft Word native date format or Oracle's date formatting; presumes date in XML date form
 - YYYY-MM-DDThh:mm:ss+HH:MM
 - Abstract date mask using Oracle's abstract date format; date in form
 - `<?format-date:fieldname;'MASK'?>`
 - Masks include: LONG, LONG_TIME, LONG_TIME_TZ, MEDIUM, MEDIUM_TIME, MEDIUM_TIME_TZ, SHORT, SHORT_TIME, and SHORT_TIME_TZ
- Do not mix date formats (product gets confused)



- XSL and XSL:FO are W3C standard mechanisms for formatting
- XSLT is designed for transformations to a variety of output formats
- XSL-FO is designed specifically for creating highly-formatted print output such as RTF (rich text file) or PDF (portable document format)
- XSLT is an excellent choice for web-based output, particularly when it is produced in an on-demand or ad-hoc fashion
- When predictability and reliability are necessary, the more-controlled output offered by XSL-FO is called for



- PDF templates may be created using any PDF document such as:
 - Layout designed using applications that generate PDF
 - Scanned document
 - Downloaded existing PDF document
- PDF templates are not recommended for documents that will require frequent layout changes
(more difficult than with RTF templates)



- Oracle's BI / XML Publisher brings the power of the database to standardized reporting
- BI / XML Publisher allows report designers to reuse queries to build reports in many forms



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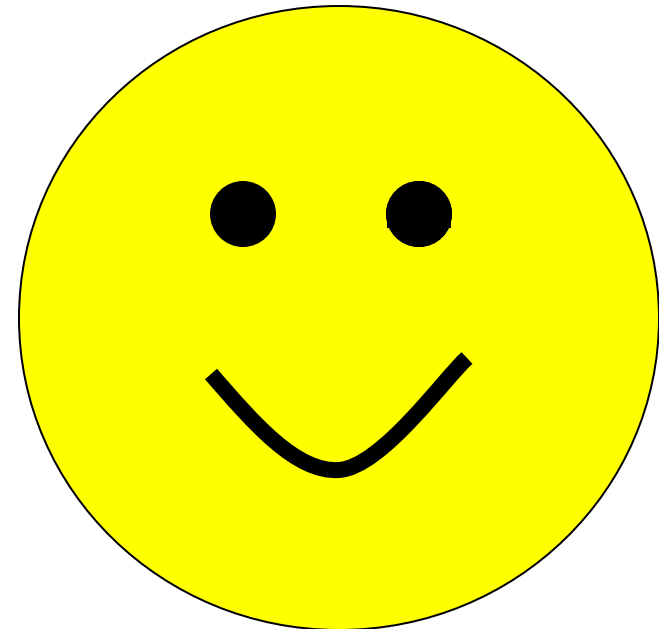
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Thanks for your attention!

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